DAILY ANALYSIS

13 July 2026

ZITA PLUS

Economic Calendar

Time	Cur.	Event	Forecast	Previous
15:30	USD	3-Month Bill Auction		3.735%
16:30	USD	Fed Waller Speaks		

War Risk Returns to Center Stage

CENTCOM conducted fresh military strikes against Iranian positions to diminish Tehran's capacity to threaten commercial shipping throughout the Strait of Hormuz. Ordered by Donald Trump, this operation followed a previous massive intervention that destroyed approximately 140 Iranian military assets via aircraft, drones, and naval munitions. In response, Iran's Revolutionary Guard Navy declared the crucial shipping lane closed until further notice, halting one non-compliant vessel with warning shots and warning neighboring states against assisting Western forces.

While the United States insists the channel remains open, this severe geopolitical escalation is creating significant waves across financial markets. Goldman Sachs cautioned that subsequent inflationary pressures could drag equity indexes lower by forcing the Federal Reserve to implement restrictive interest rate hikes, despite otherwise resilient corporate earnings reports.

Although the investment bank anticipates steady rates in the near term, market participants are rapidly pricing in 50 basis points of monetary tightening by mid-2027.

Historically, the S&P 500 experiences initial volatility during the onset of such tightening cycles before recovering over a longer horizon. This fourth American military strike within a week, coupled with Iranian retaliation against regional targets, keeps international trade infrastructure under intense pressure.

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Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.14009	-0.13%	-0.35%	-1.63%	-2.89%
GBPUSD	1.33834	-0.19%	-0.06%	-0.23%	-0.57%
AUDUSD	0.69423	-0.21%	-0.19%	-1.85%	4.04%
NZDUSD	0.57576	-0.09%	0.98%	-1.12%	0.03%
USDJPY	161.922	0.14%	-0.10%	0.99%	3.30%
USDCAD	1.41672	0.13%	-0.26%	1.26%	3.25%
METALS					
XAUUSD	4087.84	-0.81%	-1.85%	-5.15%	-5.37%
SILVER	59.27	-0.97%	-4.47%	-15.30%	-16.83%
PLATIN	1623.9	-0.31%	-1.17%	-8.40%	-21.55%
INDICES					
S&P 500	7565.49	-0.13%	0.37%	0.15%	10.52%
DOW JONES	52555	-0.16%	-0.94%	1.71%	9.34%
NASDAQ	29726	-0.33%	0.09%	-2.68%	17.73%
NIKKEI	68930	0.54%	-1.16%	-0.56%	36.93%
DAX	25067	-0.20%	-2.76%	3.54%	2.35%
ENERGY					
CRUDE OIL	73.883	3.46%	7.78%	-8.50%	28.67%
BRENT OIL	78.595	3.40%	9.17%	-5.50%	29.16%
NATURAL GAS	2.9152	-0.84%	-10.16%	-7.37%	-20.91%
BONDS					
US 10Y	4.5880	0.0260	0.11%	0.11%	0.42%
DE 10Y	3.0347	0.0181	0.10%	0.01%	0.17%
JAPAN 10Y	2.7420	0.0201	-0.10%	0.16%	0.67%
UK 10Y	31.3200	0.1400	0.35%	-0.63%	4.16%
CHINA 10Y	6.7100	0.0400	-0.01%	-0.22%	0.14%

EURUSD

The euro remains weak against the dollar, hovering near the critical 1.1400 threshold as geopolitical conflict fuels safe-haven demand for the dollar. Anticipated volatility surrounds the ongoing U.S.–Iran frictions and approaching CPI metrics, compounded by divergent central bank policies. Technical sellers retain control while price action stays below the April descending trendline.

The first resistance level stands at 1.1440, while initial support is located at 1.1360.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1500	**1.1465**	**1.1440**	**1.1360**	**1.1330**	**1.1300**

XAUUSD

Gold dropped beneath $4,100 an ounce on Monday, remaining under pressure as ongoing U.S.-Iran missile strikes drove crude prices upward, intensifying expectations of Federal Reserve rate hikes to contain inflation. The latest escalation followed a fourth American strike on Sunday. Investors are now focused on upcoming inflation figures and Fed Chairman Kevin Warsh's key congressional testimony on Tuesday.

First resistance is seen at 4120, with initial support near 4020.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4200	**4160**	**4120**	**4020**	**3950**	**3900**

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USDJPY

The USD/JPY pair consolidated within a narrow range ahead of key U.S. inflation metrics, retreating from recent multi-decade peaks while preserving its overarching bullish trajectory. Domestic asset buying emerged after Japan's Finance Minister urged pension funds to home in on local investments. However, elevated oil prices driven by geopolitical tensions continue to strain the import-dependent yen.

First resistance is seen at 162.30, with initial support near 161.20

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
163.50	162.80	162.30	161.20	160.00	159.00

BTCUSD

Bitcoin established short-term upward momentum, recovering from recent lows to reclaim its 100-day moving average. Prevailing uncertainty regarding the July Federal Reserve meeting restrains aggressive purchasing, while prior June ETF outflows were neutralized by long-term investor accumulation. However, capital rotation into technology and AI sectors has reduced cryptocurrency liquidity, delaying attempts to revisit previous spring peaks.

First resistance is seen at 65,000, with initial support near 62,500.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
68.000	66.500	65.000	62.500	61.500	60.000

BRENT OIL

Brent crude jumped over 3% past $78 a barrel on Monday, reversing a two-day decline as escalating U.S.–Iran missile friction threatened shipping lines. The latest hostilities followed a fourth round of American strikes on Sunday. This renewed geopolitical tension dismantled prior peace-deal optimism, dimming diplomatic expectations as Iran demands firm U.S. commitments before returning to negotiations.

Resistance is seen at 80.50, while the nearest support stands at 75.50.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
84.20	82.00	80.50	75.50	73.80	71.50

NASDAQ

The Nasdaq 100 stabilized near record peaks following a two-day recovery, maintaining a 16% year-to-date advance. Market participants await upcoming CPI data for Federal Reserve monetary policy insights. While SpaceX's index inclusion drives passive investment inflows, capital is actively rotating away from top semiconductor leaders into defensive equities and secondary artificial intelligence hardware providers.

Resistance stands at 29,850, while the nearest support is located at 29,400.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
$30.300	$30.000	$29.850	$29.400	$29.000	$28.600

USDCNH

The USD/CNY pair extended its steady downward correction, approaching critical support thresholds. The PBOC actively adjusted its midpoint fixing to counter market volatility amid trimmed Chinese growth projections from Beijing and the World Bank. Geopolitical friction in the Middle East sustains a safe-haven floor beneath the dollar, anchoring the pair despite softer U.S. employment figures.

Resistance stands at 6.8000 while the nearest support is located at 6.7700.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.8350	6.8200	6.8000	6.7700	6.7500	6.7300

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